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Lawn&Garden Marketing

APRIL/MAY 1986

Reports on: OPEDA meeting

Fall sales • Winter product movement

Contents

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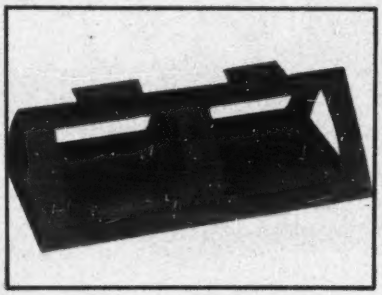
Page 6

Page 10



Page 30

FEATURES

Why the new excitement over shredders?

New state and local burning/trash disposal laws are helping to provide a renewed interest among consumers in shredders and grinders ..... **page 6**

OPEDA members told to recruit, train dealers

Tony Malizia, Snapper executive and keynote speaker at the annual meeting of OPE distributors, encouraged members to seek dealers with an entrepreneurial spirit and said that training these dealers could become a joint effort by distributors and manufacturers..... **page 10**

OPEDA membership grows

Although distributor market share has slipped, distributor membership in OPEDA has grown. Speaker Don Beveridge challenges distributors; Pete McConkey elected president.... **page 12**

Fall sales: a 5-year look

Imaginative suppliers and retailers of lawn and garden products are cashing in on fall season sales with special fall promotions and events. The Planting Council and Netherlands flower bulb importers provide a major force behind the movement..... **page 14**

DEPARTMENTS

Editor's Notebook

Is salary the weak link in the marketing chain? ..... **page 4**

Questionnaire

An *LGM* salary survey. Are retailers of lawn and garden products keeping up with the economy in salaries and other aspects of employee compensation? ..... **page 17**

In the News

Safer Agro-Chem changes name; Expo 86 reservation information available; and Disston Co. examines, monitors imported rake programs ..... **page 21**

Product Movement Report

Winter 1985 report shows that nationally more retailers reported sales of birdfeeders and replacement parts up than down; kerosene heaters continued downward trend..... **page 24**

New Products

Fly traps, watering equipment, sun-style heaters and more ..... **page 30**

Green Scene

Classic bluegrass granted Variety Protection..... **page 32**

Cover photo by Ron Anderson, Pitzner Studio. Shredder courtesy of AL-KO Kober Corp., Elkhart, Ind.

Power Equipment Report

National Equipment Servicing Dealers Assn. profiles the dealer in this first of a three-part survey; Canadian Tariff Board resumes hearings in May on dispute over lawn equipment classifications ..... **page 40**

Marketing in Action

New advertising, public relations program available for arborists; Homelite begins packaging 2-cycle oil in six-packs..... **page 42**

Manufacturers' Literature

New literature available from Canadiana, Ringer Corporation, Agri-Fab and others. ..... **page 47**

Calendar ..... **page 50**

JUNE:

- **Selling winter products**
- **Trim-a-tree**
- **Snowthrower sales update**
- **NHS information**
- **Expo 86 entertainment**

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Fall sales: a 5-year look

Planting, cleanup and winterizing are consumer activities which offer fall marketing opportunities to imaginative suppliers and retailers of lawn and garden equipment.

By Steve Trusty

Suppliers are beginning to take note of increased potential in promoting lawn and garden products in the fall. One example is Ames Lawn & Garden Tools, Parkersburg, W. Va., which for the first time ever, will this year bolster its fall sales strategy by offering a fall rebate program to consumers.

Another company, Ross Daniels, West Des Moines, Iowa, is looking hard at its marketing plans and developing ideas specifically to promote fall sales. According to Larry Daniels, director of marketing for the company, Ross Daniels' fall business has increased steadily over the past five years. "Even though we were skeptical at first, we looked at (the fall planting program) as extending the season," he says.

Ames and Ross Daniels are two companies indicative of the interest many suppliers and retailers are showing in promoting fall lawn and garden products and activities. According to Bob LaRue of LaRue Marketing Consultants, what began with isolated regional programs has become a national movement, and the past five years have witnessed the evolution of the movement embraced by all segments of the lawn and garden industry. The bulb industry was the first major contributor to the Fall Is For Planting program.

The Fall Merchandising Test

A 1985 study commissioned by the International FlowerBulb Center in Hillegom, The Netherlands, found that independent garden centers use 20 percent more sales aids in their stores when they are handled by bulb suppliers rather than by conventional methods.

"The 20 percent increase," explained G.M.A. LePoole, the organization's managing director, "could significantly change the sales picture at these retail centers in the future."

The study also found that independent garden centers will almost always accept and use P-O-P material offered by bulb suppliers.

The study, called The Fall Merchandising Test, was conducted by LaRue Marketing Consultants of South Plainfield, N.J., and involved 500 independent garden centers in 40 markets across the United States.

"We chose this point-of-sale area because it is the buyer," explained LaRue. "What we didn't know is if independent garden centers agreed with us, or if they would be receptive to in-store assistance by specialists. Now we know they're agreeable to both."

Other highlights of the test included:

- Retailers have identified the "impulse factor" and are seeking to remind customers to buy and plant in the fall for their spring blooms.
- Successful [illegible] much [illegible] the effective use of P-O-P as to good weather conditions.
- Independent garden centers are receptive to visits by sales persons who can offer them assistance, and the centers will almost always display and accept P-O-P material from such visits. The reason given for its acceptance is "ready to place sale."
- Retailers' [illegible] the best placed were found to be [illegible] were often placed in high-traffic areas of the store.

The conclusions of the test were drawn from a combination of [illegible] reports, personal interviews, [illegible] observations and telephone [illegible]. In addition to the study, [illegible] printed [illegible] support the findings [illegible] garden center chains and [illegible] similar programs for the use of P-O-P material.

A long way since 1981

The fall selling season has come a long way since 1981. LaRue was one of the original supporters of the national rollout of the Fall Is For Planting program, sponsored by The Planting Council. An article in the April/May 1982 issue of *Lawn and Garden Marketing* said, "A recent survey of retailers showed that bulbs were one of the few lawn and garden product lines to show an increase in sales in the fall of 1981."

While worldwide exports of Dutch bulbs have increased nearly 20 percent from 1981 through 1984, exports to the United States have increased more than 41 percent in that same period.

Bulbs are not the only segment of the industry that has benefited from this fall sales thrust. Many retailers and landscapers have reported increased fall business. Manufacturers, distributors and retailers of power equipment have benefited, as have the growers of green goods who have prepared for and promoted fall sales.

Bulb exports from Holland to the United States

(in millions of bulbs)

	1981	1982	1983	1984	Average annual percentage increase	Four-year percentage increase
Tulips	178	187	204	232	9.3%	30.3%
Daffodils	37	37	47	58	13.7	56.2
Hyacinths	21	27	25	27	9.5	28.6
Crocuses	49	54	62	66	10.5	34.7
Muscari	15	17	19	22	13.6	46.7
Irises	57	57	74	100	21.8	75.4
Total	357	379	431	505	12.4%	41.5%

Source: Netherlands Flowerbulb Information Center/International Flowerbulb Center

There are many factors that affect fall sales. Adverse weather conditions in a given area probably hurt business more than excellent weather helps business. The local or regional economy also has a big effect on sales any time of the year but more so in the fall. And promotional efforts by the various links in the distribution line are a big factor.

While many people do not credit the Fall Is For Planting campaign as a major factor for the increase in fall sales, those who participated in it seem to be faring better than non-participants. In the fall 1985 *LGM* Product Movement Report, 40 percent of the respondents rated their fall selling season as good to excellent.

Yet, a survey answered by 264 members of The Planting Council, (formerly The Fall Planting Council), showed that 74 percent of the 264 respondents rated 1985 fall sales as good to excellent; 62 percent of these companies had an average increase of nearly 17 percent over 1984 fall sales. The survey represented 1,123 retail outlets with more than 6,000 employees. This indicates that the movement is having a positive effect on those embracing it and a limited benefit to those who haven't gotten behind it.

George Mikkola, development director of The Planting Council, reports a steady rise in both the number of retailers showing an increase in fall sales over the

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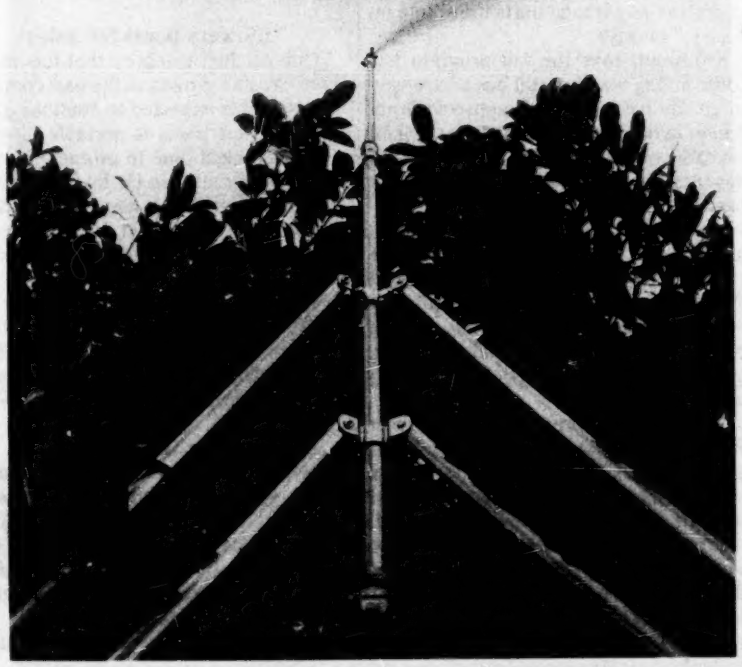

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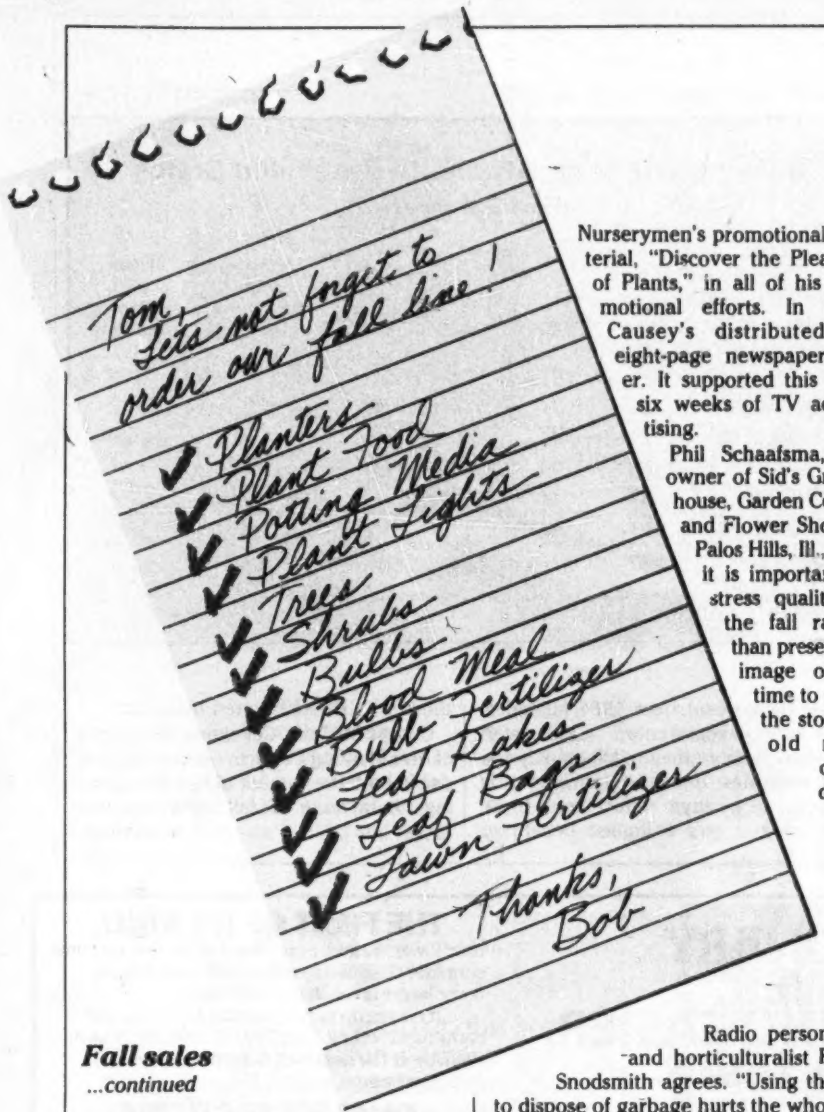

Fall sales

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previous years and the percentage of the increase. A 1985 Planting Council survey showed 30 percent of the respondents experienced an average 10 percent increase in 1982 fall sales over 1981; 48 percent experienced an average 12 percent increase in 1983 over 1982; and 5 percent had an average 16 percent increase in 1984 over 1983.

Retailers benefit

A few operations have shown even more dramatic results. J.D. Causey of Causey's Garden Centre in Wilmington, N.C., reports the following figures: In September, October and November 1983, sales were up 22 percent from 1982; for the same months in 1984, sales were up 26 percent over 1983; in 1985, sales were up 33 percent over 1984. And September, October and November sales represented 34 percent of the company's total business in 1985. (Causey's bulb business doubled in 1985 from 1984.)

Causey uses material from The Planting Council and the American Assn. of Nurserymen's promotional material, "Discover the Pleasure of Plants," in all of his promotional efforts. In 1985 Causey's distributed an eight-page newspaper flyer. It supported this with six weeks of TV advertising.

Phil Schaafsma, co-owner of Sid's Greenhouse, Garden Center and Flower Shop in Palos Hills, Ill., says it is important to stress quality in the fall rather than present an image of "a time to clear the store of old merchandise."

Radio personality and horticulturalist Ralph Snodsmith agrees. "Using the fall to dispose of garbage hurts the whole industry," he says.

Snodsmith says the fall program has come a long way but still has a long way to go. He has noticed an appreciable increase in questions about fall planting on his radio shows and during his personal appearances. Snodsmith believes it has been a lot easier to convince the consumer to become involved in fall planting than it has been to convince the retailer. "We need to educate our people (in the industry) not just the consumer," Snodsmith says. The better garden centers have been selling fall all along, he says, and everyone else needs to become involved.

Brad Nichols, president of Wilt-Pruf Products, Greenwich, Conn., says its product's sales have gone up appreciably over the past five years. He says interest in fall gardening has increased. "Gardeners are becoming more sophisticated and taking better care of their plants," he says. "They are also paying more attention to the garden writers and extension personnel."

Another indication of increased fall promotion comes from Michael Deitsch, director of marketing of Ames Lawn & Garden Tools. He says his company's co-op ad claims for fall are up. "Retailers are realizing they can promote in the fall," he says.

Deitsch believes the whole educational campaign is paying off. "The Planting Council has done a tremendous job with what they have had, but they need even more industry funded support."

There has been an increase in usage of the material available from The Planting Council. A survey of 1982 participants showed that 88 percent of the respondents used the all-weather banner; 93 percent of the respondents in the 1985 survey used theirs. In 1982, 50 percent of the respondents used the ad slicks; in 1985, 70 percent used theirs.

Pat Schlusser, executive director of the Pennsylania Nurserymen's Assn., says adjustments have had to be made by growers and distributors. At first, many were not geared to fall promotions. Stock wasn't available or shipments were not scheduled. "Marketing adjustments are now being made," she says.

The general consensus of her members is that there is an increase in fall business. "An added benefit of the extended season to the nurserymen has been their ability to keep more of their better people busy for a longer period of time," Schlusser says.

Blowers boast fall sales

One product category that has shown considerable growth in the past couple of years, and is expected to continue growing at a fast pace, is portable blowers. Fall is an ideal time to promote blowers because of their use for leaf cleanup.

Chip Cutler, sales manager for Steve Willard Inc., a Fairfield, N.J., distributor, reports that 60 percent of their blower sales are for fall business.

Willard has been a distributor for HMC/The Green Machine for the past five years and serves the New York metropolitan area. In that time, sales have quadrupled from the first year's sales.

According to Cutler, most of the growth has been in the last two or three years. He attributes the sales increase to greater consumer awareness and technological improvements. "The new generation of blowers is lighter weight, quieter, has increased power and is time-saving for the consumer."

continued...

Fall sales

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Cutler predicts a 50 percent increase in blower sales for 1986 over 1985. He says the manufacturer has stepped up fall promotions each of the last three years, and each year has seen increased awareness of the blower and its uses in the fall.

Bill Chambers, director of marketing for The Green Machine, believes blowers will follow a sales pattern similar to the one experienced by spin trimmers. "As the consumer gets used to using the electric blowers, he will switch to the more versatile gas models."

Chambers says that while electric blowers showed a 61 percent increase in 1984 sales over 1983, gas-powered blowers showed an 83 percent increase.

Bulb merchandising monitored

In fall 1985, LaRue Marketing Consultants, on behalf of the Netherlands FlowerBulb Information Center (NFIC), visited approximately 100 independent garden centers in 17 states. Because LaRue has been observing garden center merchandising for a number of years, his firm was consulted to observe how the fall selling season has changed in the past five years.

LaRue found that 40 percent of the centers visited were using The Planting Council's sales aids. He also said that these aids were effectively integrated with those provided by suppliers and other associations. He detected a greater use of the AAN's materials with their season extending thrust.

LaRue believes that suppliers are getting more involved in fall programs. He cited one example of the use of the FIFP logo on fertilizer bags by Bandini. And LaRue has noticed somewhat better overall in-store merchandising by the retailers with a definite improvement for Dutch bulbs. "The bulbs are more visible and identifiable," he says. Sales aids are presented much better; sell-down activities were managed much better than in previous years, and the retailers are doing a much better job of consolidating the displays so the bulbs don't appear picked over: the total display area shrinks, but it still looks full.

More retailers are staging events to bring in fall customers, too. Those who have tried them are continuing them and, in many cases, expanding them. Some examples of events include: A scarecrow contest staged by Snipes Nursery of Morrisville, Pa., and a Halloween event staged by Hicks Nursery on Westbury, Long Island, N.Y. Gloria's Garden Center in Milford, Conn. started a tent event in 1982 and is continually expanding it. Many retailers center events around local or regional broadcast personalities.

LaRue believes there is more appeal to a "Dutch Day" or a Holland Happening" than there is to a "Fertilizer Festival." Although he says he is all for selling fertilizer, LaRue says, "Utilize the most appealing theme you can to sell all products."

One area that could really be improved on, according to LaRue, is the management of information. He says garden centers need to concentrate consumer information in a central area. It is important to make the customer feel comfortable about seeking advice.

Although only about 40 percent of the centers visited by LaRue were pricing their bulk bulbs in multiples, this is an increase over previous years. Pricing in multiples encourages multiple sales, he says.

LaRue says he has seen an improvement in tie-in sales. Sid's Greenhouse, for example, tried a fall event for the first

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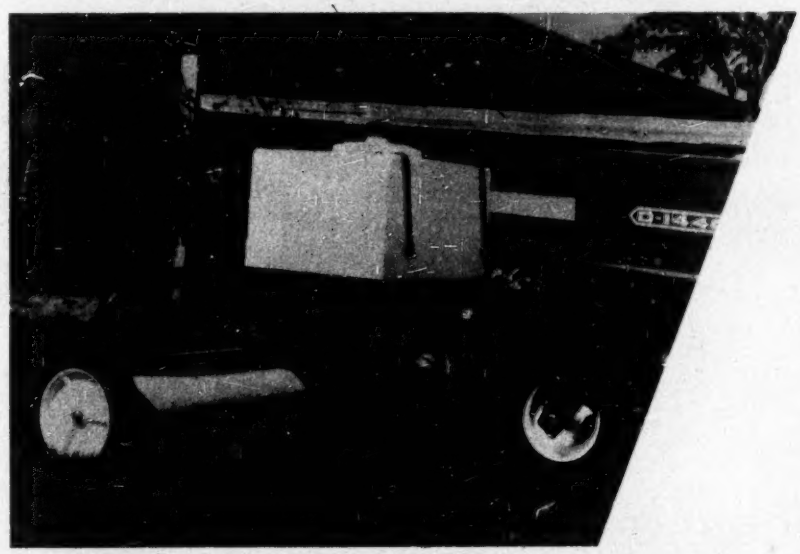

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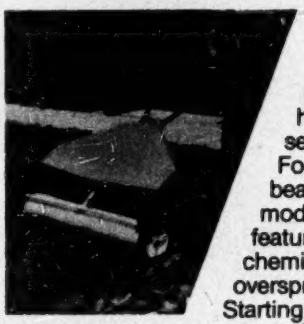

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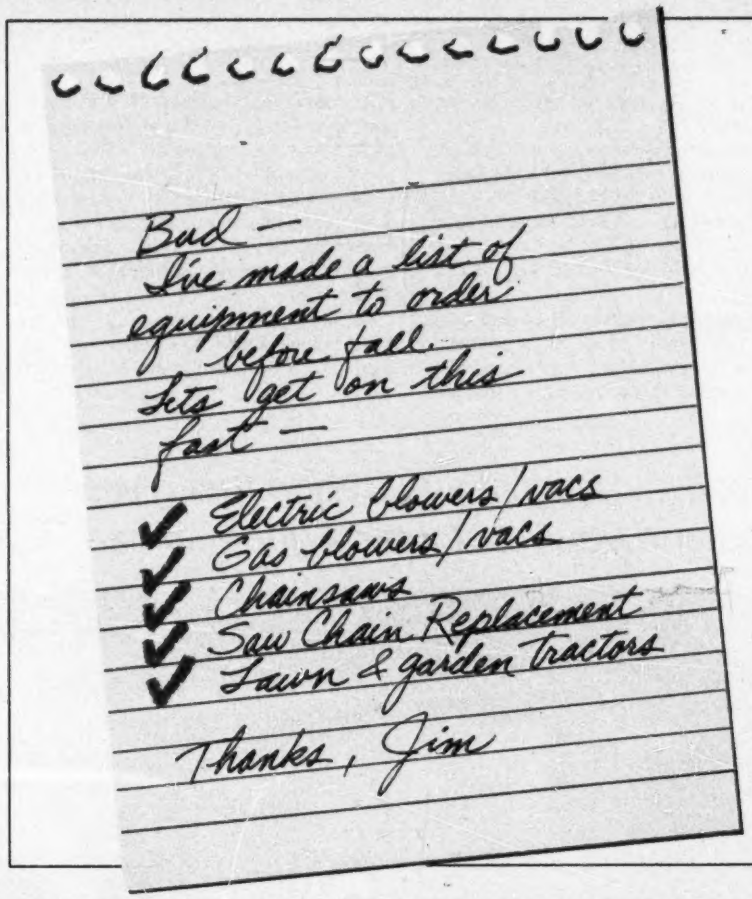

Fall sales

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time in 1985. Co-owner Schaafsma said the company budgeted $500-$600 for promoting a three-day event called "Dutch Days."

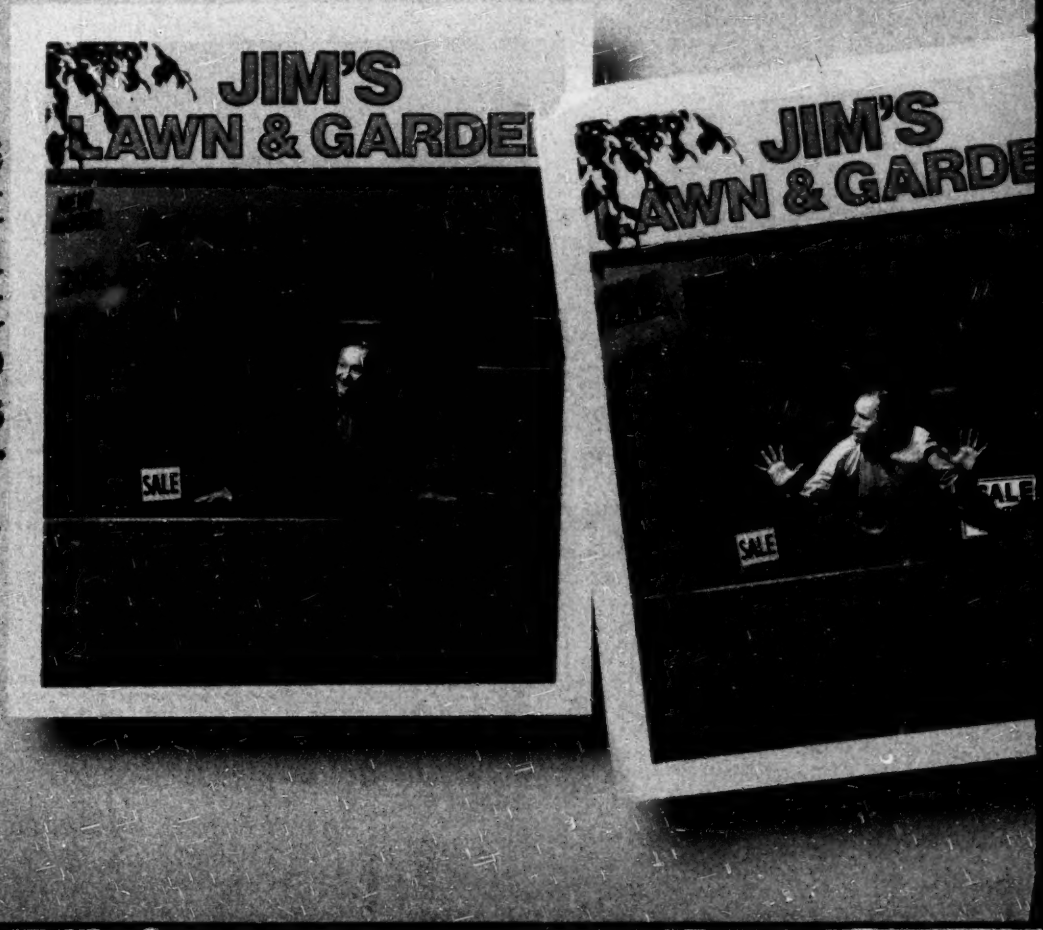
It had the Dutch flag and employees in Dutch costumes. Even though it rained that weekend it was still a successful event, and Sid's is planning a 10-day "Dutch Days" event for 1986 with a promotion budget of $2,000. Sid's hopes by spreading the event over two weekends, it can minimize the potential problems of bad weather. Although bulbs are the centerpiece of the promotion, all fall items sell well, according to Schaafsma.

The past five years have provided many examples of successful promotions and sales. The industry as a whole benefited from the efforts of a relatively few, farsighted individuals; the movement is blossoming.

While some have benefited more than others, the opportunity is there for extending the season; products and promotions are linking one season to another, helping retailers and suppliers alike approach their goal of year-round sales activities.

—LGM

Sometimes the last thing you think about is who finances your inventory.



Product Movement Report

Winter 1985

While retailers continued to report increased sales of birdfeeders and replacement parts, most other product lines measured in the winter 1985 *Lawn & Garden Marketing* survey remained steady.

Significantly more retailers reported sales of birdfeeders up than reported them down compared to the winter 1984 season, obviously reflecting heavy snowfall in some regions of the country. Sales of birdfeeders are often directly related to the amount of snowfall during the season. More consumers feed birds when the ground is covered by snow.

Replacement parts sales continued to reflect the buyers' preference to repair old equipment rather than replace. More retailers reported sales up than down, although the trend does appear weaker than in previous seasons.

Kerosene heater sales, on the other hand, continued their downward spiral of previous seasons. Retailers indicated the product line was continuing the steady decline in sales that has been evident for several seasons. (See table.)

Retailers also said tractor attachment sales turned downward during the winter season. This is a slight change from the steady sales retailers reported a year ago.

Nationally, retailers indicated sales of snow shovels and indoor plant supplies were both relatively steady compared to sales in winter 1984. Sales of bagged melting compounds were only slightly higher according to the respondents.

Information about sales of trim-a-tree products and snowthrowers will be available in the June issue of *LGM*.

Sales in the Northeast tended to follow national trends with a couple of exceptions. More retailers reported sales of birdfeeders down than reported them up.

Slightly more retailers reported sales of snow shovels up than down, and sales of tractor attachments were steady, according to respondents.

Retailers reported these results in the seven product lines measured.

- **Birdfeeders:** 35 percent carry the line; 9 percent said sales were up, 14 percent said same and 12 percent said down;
- **Snow shovels:** 49 percent carry the line; 16 percent said sales were up, 21 percent said same and 12 percent said down;
- **Tractor attachments:** 46 percent carry the line; 7 percent said sales were up, 30 percent said same and 9 percent said down;
- **Replacement parts:** 54 percent carry the line; 21 percent said sales were up, 30 percent said same and 4 percent said down;
- **Bagged melting compounds:** 44 percent carry the line; 12 percent said sales were up, 21 percent said same and 11 percent said down;
- **Kerosene heaters:** 26 percent carry the line; an insignificant percentage said sales were up, 12 percent said same and 14 percent said down;
- **Indoor plant supplies:** 33 percent carry the line; 4 percent said sales were up, 25 percent said same and 5 percent said down.

In the North Central, retailers reported sales that followed the national trends closely. Sales of birdfeeders were

continued...

Winter product sales changes

(% of respondents)

	% carrying	% up	% same	% down
Birdfeeders	43.1			
Kerosene heaters	31.8			
Replacement parts	53.3			

Heavy snows in some areas of the country helped increase sales of this category.

Same old story here, and fewer respondents carrying the line.

A repair-rather-than-replace philosophy among consumers seems to be giving this category a boost.

Source: LGM winter 1985 survey.
Based on 255 respondents indicating sales changes in each product category compared to winter 1984. Percentages do not add up to 100 percent because not all the respondents carry all the product lines.

Product Movement

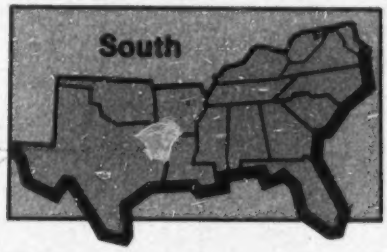
...continued

the strongest in this region.

Snow shovel and bagged melting compound sales also appeared slightly stronger than nationally.

These results were reported:

- **Birdfeeders:** 46 percent carry the line; 20 percent said sales were up, 19 percent said same and 6 percent said down;
- **Snow shovels:** 41 percent carry the line; 17 percent said sales were up, 13 percent said same and 12 percent said down;
- **Tractor attachments:** 39 percent carry the line; 8 percent said sales were up, 18 percent said same and 13 percent said down;
- **Replacement parts:** 63 percent carry the line; 17 percent said sales were up, 35 percent said same and 12 percent said down;
- **Bagged melting compounds:** 41 percent carry the line; 16 percent said sales were up, 17 percent said same and 9 percent said down;
- **Kerosene heaters:** 31 percent carry the line; 6 percent said sales were up, 10 percent said same and 16 percent said down;
- **Indoor plant supplies:** 36 percent carry the line; 7 percent said sales were up, 21 percent said same and 8 percent said down.



Retailers in the South showed a wide variance from the national trends in several product lines. While retailers indicated birdfeeder and replacement part sales were more up than down, the trend was weaker.

Snow shovel and bagged melting compound sales were at odds with national trends. While nationally retailers indicated sales were steady or up, in the South more retailers reported sales more down than up. A milder winter could be a factor in the region.

On the other hand, tractor attachments were steady rather than down, and indoor plant supplies showed increased rather than steady sales.

Retailer results show:

- **Birdfeeders:** 46 percent carry the line; 17 percent said sales were up, 15 percent said same and 14 percent said down;
- **Snow shovels:** 30 percent carry the line; 3 percent said sales were up, 14 percent said same and 14 percent said down;
- **Tractor attachments:** 18 percent carry the line; 5 percent said sales were up, 9 percent said same and 5 percent said down;
- **Replacement parts:** 49 percent carry the line; 17 percent said sales were up, 24 percent said same and 8 percent said down;
- **Bagged melting compounds:** 29 percent carry the line; 5 percent said sales were up, 14 percent said same and 11 percent said down;
- **Kerosene heaters:** 39 percent carry the line; 5 percent said sales were up, 14 percent said same and 21 percent said down;
- **Indoor plant supplies:** 46 percent carry the line; 11 percent said sales were up, 29 percent said same and 6 percent said down.

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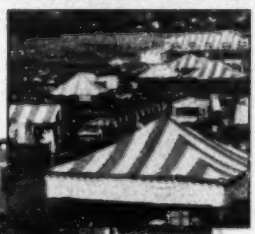

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Product Movement

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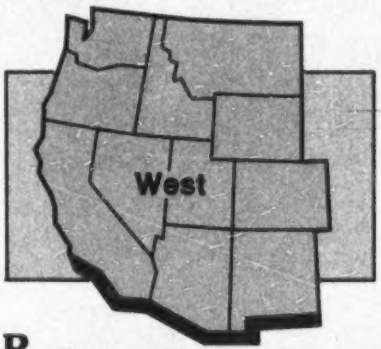

Retailers in the West showed increased sales of birdfeeders, snow shovels, melting compounds and kerosene heaters. However, the means of measuring kerosene heater sales may not be accurate due to the small sample size.

Replacement part sales in the region also showed only steady sales rather than the increases seen in other regions.

Retailers reported these changes in winter sales:

- **Birdfeeders:** 45 percent carry the line; 14 percent said sales were up, 28 percent said same and 3 percent said down;
- **Snow shovels:** 38 percent carry the line; 14 percent said sales were up, 21 percent said same and 3 percent said down;
- **Tractor attachments:** 31 percent carry the line; an insignificant percent said up, 21 percent said same and 10 percent said down;
- **Replacement parts:** 48 percent carry the line; 7 percent said sales were up, 35 percent said same and 7 percent said down;
- **Bagged melting compounds:** 28 percent carry the line; 14 percent said sales were up, and an insignificant percent said the same or down; 14 percent did not indicate the amount of change;
- **Kerosene heaters:** 28 percent carry the line; 7 percent said sales were up, 17 percent said same and 3 percent said down;
- **Indoor plant supplies:** 31 percent carry the line; 10 percent said sales were up, 10 percent said same and 10 percent said down.

The winter 1985 survey results were based on 255 responses from four categories of retailers: garden center, hardware/home center, multi-department store and power equipment dealers. Respondents were asked to compare sales of product categories in winter 1985 to winter 1984. As a result of rounding, percent of change does not always total the percent carrying the line.

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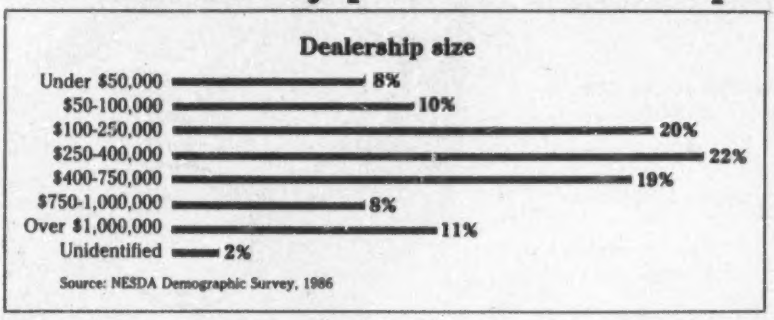
Power Equipment Report

NESDA survey profiles dealerships



A survey of power equipment dealers shows 67 percent consider their dealership image to be sales oriented as opposed to 32 percent who consider it service oriented, according to the National Equipment-Servicing Dealer's Association's latest data.

The demographic survey, sent to 1,500 dealer members of NESDA, was designed to present a profile of the average dealer. "We are becoming respected as the national voice of servicing dealers," explains Norm Beck, NESDA executive director. "To fulfill that role, we have to know who our dealers are."

Almost every dealership with sales of more than $100,000 reported it has full-time employees, while almost all dealerships said they used part-time or seasonal employees.

Only about 4 percent of dealerships with sales of less than $750,000 employ outside salespeople; 37 percent of dealerships with sales of more than $750,000 use outside salespeople.

The customer profile of dealerships indicates a highly consumer-oriented business. Consumer business represents 79 percent of business in dealerships of less than $400,000 in sales and 72 percent in dealerships of more than $400,000 in sales. Landscape, institutional and government business represents only a small portion.

About 24 percent of dealers reported 11 to 15 years of experience in the business, while 21 percent indicated six to 10 years; 18 percent indicated 21-30 years of experience. About 14 percent said they had up to five years of experience, and the same percentage showed 16-20 years in business. About 8 percent reported 31-40 years of business experience, and 1 percent said 40 years or more.

This survey represents only the first of a three-part demographic study by NESDA. The second part asks about labor rates, training and advertising while the final part reflects dealer questions about other successful dealers. "Dealers want to know whether they are doing business the way other successful dealers do business," Beck says.

Canadian Tariff Board schedules May hearings

The Canadian Tariff Board recessed until May 5, when it resumes hearings on the classification of lawn and garden tractors for tariff purposes.

At that time, the board meets for two weeks of hearings to listen to arguments from U.S. industry. The U.S. industry supports classifying the equipment as tractors. If classified as tractors, the equipment is not taxed since agricultural equipment is exempt from tariff.

In December, the tariff board listened to the case in support of the current position. The position of the deputy minister of customs and excise basically states that lawn and garden tractors are power lawnmowers for customs purposes. Lawnmowers are subject to a 12 percent duty.

Representatives of the Outdoor Power Equipment Institute and several member companies are scheduled to testify at the May hearings. After the evidence is presented, there will be oral arguments and a decision by the board will be made one to two months later.

That may not be the end of the problem, however. If U.S. industry wins the case, it is possible customs may not be willing to implement the board's decision, or legislative action may be taken to reverse the board's decision.

Briefs

• The Agricultural & Industrial Manufacturers Representatives Assn. has scheduled its summer All Industry Appointment Session and Seminar for July 25-27. The meeting takes place in Louisville, Ky., just prior to the opening of the International Lawn, Garden & Power Equipment Expo, July 28-30.

• Simaver, the French garden equipment trade show, faced a depressed French market. The market for power tillers was described as collapsed while lawnmowers were down but only slightly. Domestic manufacturers in France are putting increased effort into new models.

• Excel Industries is offering a new dealer direct agreement for its line of utility mowers, separate from its standard Hustler line. Select dealers will deal directly with the factory and can look forward to national advertising and promotion support and floor plan assistance.

• Gilson Brothers, Plymouth, Wis., established a direct dealer marketing organization for the province of Quebec, Canada. Dealers will be offered the complete line of outdoor power equipment including floor plan and retail finance programs. Sales will be handled through Freniere Equipment Ltee, a Division of Rofrex Hydralique, Magog, Quebec.

• Kubota Credit Corp., Compton, Calif., has established an annual financing rate of 8.5 percent for customers purchasing G-Series lawn and garden tractors, B-Series compact tractors, primarily built for nursery, estate care and landscaping, L-Series tractors, used primarily for dairy farming, orchards, vineyards and ground maintenance, and KH-Series excavators.

• The Toro Co., Minneapolis, has acquired an interest in Olathe Manufacturing Inc., a Kansas-based manufacturer of commercial lawn and garden equipment. Under the agreement, Toro has the opportunity to acquire a significant but minority percentage of the voting stock of Olathe. The privately held firm will develop and produce accessories for Toro products, and Toro will provide marketing and distribution support for Olathe products.

• Randall S. Carter has been named regional sales manager for Snapper Power Equipment. Carter will cover Illinois, Michigan and part of Indiana.

• James P. Dunne has been named president of Solo Inc., Newport News, Va., the U.S. subsidiary of Solo Kleinmotoren, GMBH, Sindelfingen, West Germany. Dunne joins Solo after five years as sales and marketing manager for the Townsend Saw Chain Co.